

Global Intelligent Computing Center Diesel Generator Sets Market Growth 2026-2032

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Abstracts

The global Intelligent Computing Center Diesel Generator Sets market size is predicted to grow from US\$ 4696 million in 2025 to US\$ 12860 million in 2032; it is expected to grow at a CAGR of 15.6% from 2026 to 2032.

Intelligent Computing Center Diesel Generator Sets are highly reliable backup power systems specifically designed for artificial intelligence data centers, intelligent computing centers, and large-scale AI training and inference infrastructure. These systems consist of diesel engines, alternators, automatic control systems, cooling systems, fuel systems, starting systems, base frames, and auxiliary components. Their primary function is to convert diesel combustion energy into mechanical power and subsequently generate stable electricity through alternators, providing long-duration backup power for GPU servers, high-performance computing clusters, storage systems, and networking equipment during grid failures, insufficient power capacity, or unstable electricity supply conditions. Compared with conventional data center diesel generator sets, AI data center generator sets require higher power density, superior reliability, faster startup response, stronger transient performance, improved voltage and frequency stability, harmonic load adaptability, advanced paralleling control, and unattended operation capability. They typically adopt MW-class high-speed diesel engines and are deployed with N+1, N+2, or 2N redundancy architectures.

Intelligent Computing Centers generally adopt a multi-layer power architecture consisting of grid power, UPS systems, and diesel generator sets. UPS systems provide millisecond-level power transfer to prevent immediate IT system interruption, while diesel generator sets provide extended backup power lasting hours or longer. Due to the high power density and continuous operation requirements of AI workloads, large-scale intelligent computing centers typically deploy MW-class generator sets, including

2MW and above systems, with multiple units operating in parallel to support large AI computing campuses. Within the industrial value chain, AI data center diesel generator sets represent a critical component of AI infrastructure power systems. Upstream suppliers include diesel engines, alternators, controllers, fuel systems, cooling systems, and other key components, with diesel engines generally accounting for approximately 65%-70% of total generator set costs. Major suppliers include Cummins Power Generation, Caterpillar Electric Power, MTU Power, Kohler Power Systems, THAIHO Power, Kotech Power, Weichai Heavy Machinery, and Yuchai Energy. Downstream customers include Amazon Web Services (AWS), Microsoft Azure, Google Cloud, Meta, Equinix, Digital Realty, Alibaba Cloud, Tencent Cloud, Baidu AI Cloud, and Huawei Cloud. Driven by generative AI, large-scale model training, and high-performance computing, AI data center diesel generator sets are evolving from conventional backup equipment into strategic energy infrastructure supporting the reliability of next-generation AI computing systems.

In 2025, the global shipment of Intelligent Computing Center Diesel Generator Sets is expected to reach approximately 10,000 units, with an average selling price of approximately US\$480,000 per unit and a manufacturing gross margin of approximately 20%.

AI Computing Revolution Drives a New Growth Cycle for Diesel Generator Sets

Historically, data center power systems were mainly designed around traditional cloud computing, internet services, and enterprise workloads, resulting in relatively stable demand for backup power equipment. However, the rapid expansion of generative AI, large-scale language models, and AI inference workloads is transforming data centers into high-power-density facilities. The deployment of GPU servers, high-speed networking equipment, and AI computing clusters has significantly increased rack-level power consumption, driving data centers from traditional MW-scale facilities toward hundreds-of-megawatts and even gigawatt-scale campuses. Meanwhile, global data center development is facing challenges including prolonged grid expansion cycles, limited power availability, and increasing uncertainty from renewable energy integration. Under these conditions, reliable backup power has become one of the most critical infrastructure requirements for AI computing facilities. Diesel generator sets remain the dominant long-duration backup power solution for hyperscale data centers due to their rapid startup capability, mature technology, convenient fuel storage, proven reliability, and global service networks.

Diesel Generator Sets Evolve from Backup Equipment into Strategic AI Infrastructure

Assets

Data center diesel generator sets are not simply standalone power equipment but a critical component of the overall data center energy architecture. Since data center operations require continuous availability, any power interruption may lead to service disruption, data loss, and hardware damage. Therefore, high-availability data centers typically adopt redundant power architectures, including N+1, N+2, or 2N configurations. For example, a data center requiring two 2000kW generator sets may deploy additional backup units to ensure continuous operation even when one unit is under maintenance or experiences failure. As AI data centers continue expanding in scale and power density, increasing installed capacity and redundancy requirements will further stimulate demand for diesel generator sets.

Supply Constraints Accelerate Localization of Data Center Generator Sets

During 2024-2025, accelerated AI data center construction created temporary supply shortages in the global large-scale diesel generator set market. Major international suppliers such as Cummins, MTU, Caterpillar, and Kohler experienced extended delivery cycles for high-power units due to strong demand. These supply constraints encouraged data center operators and IDC companies to diversify suppliers and accelerated the entry of Chinese manufacturers into the market. International suppliers maintain advantages in premium segments through extensive operating experience, global service networks, and reliability certifications. Meanwhile, Chinese companies including Tellhow Power, Cooltech Power, Weichai Heavy Machinery, Yuchai Energy, and Saiwate are expanding their presence in data center backup power markets through faster delivery, localized services, and cost advantages.

Technology Trends: Higher Power Density, Intelligent Operation, and Energy Integration

Future data center diesel generator sets will continue evolving toward higher power output, improved reliability, and intelligent operation. As AI data centers increase in scale, traditional 1MW-class generator sets are gradually upgrading toward 2MW, 3MW, and even 5MW-class systems to reduce equipment quantity and improve space efficiency. At the same time, the unique electrical characteristics of AI data centers are driving improvements in generator technologies, including high harmonic load compatibility, capacitive load operation capability, PQ curve optimization, low-load wet stacking prevention, high-altitude performance enhancement, and advanced parallel control systems. In addition, diesel generator sets are evolving from passive backup equipment into intelligent energy assets through remote monitoring, predictive

maintenance, digital twins, and energy management platforms. Although alternative solutions such as gas generation, energy storage, and hydrogen-based power systems are emerging, diesel generator sets are expected to maintain a critical role in hyperscale AI data centers for the foreseeable future due to their proven reliability and mature global supply chain.

LP Information, Inc. (LPI) ' newest research report, the "Intelligent Computing Center Diesel Generator Sets Industry Forecast" looks at past sales and reviews total world Intelligent Computing Center Diesel Generator Sets sales in 2025, providing a comprehensive analysis by region and market sector of projected Intelligent Computing Center Diesel Generator Sets sales for 2026 through 2032. With Intelligent Computing Center Diesel Generator Sets sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Intelligent Computing Center Diesel Generator Sets industry.

This Insight Report provides a comprehensive analysis of the global Intelligent Computing Center Diesel Generator Sets landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Intelligent Computing Center Diesel Generator Sets portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Intelligent Computing Center Diesel Generator Sets market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Intelligent Computing Center Diesel Generator Sets and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Intelligent Computing Center Diesel Generator Sets.

This report presents a comprehensive overview, market shares, and growth opportunities of Intelligent Computing Center Diesel Generator Sets market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

0.5–2MW

2–4.5MW

?5MW

Segmentation by Voltage Level:

Low Voltage Diesel Generator Set

Medium Voltage Diesel Generator Set

High Voltage Diesel Generator Set

Segmentation by Frequency Rating:

50Hz

60Hz

Others

Segmentation by Application:

AI Training Data Center

AI Inference Data Center

Hyperscale AI Cloud Data Center

Intelligent Computing Center

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Cummins

MTU

Caterpillar

Generac

Kohler

Himoinsa

Aksa Power Generation

FG Wilson

Sumec

Simpson

Cooltech

Weichai Heavy Machinery

Superwatt

Yicheong

Tellhow Power

Fukangsi

Weichai Power

SNAT

Power HF

Senci

Yuchai

Key Questions Addressed in this Report

What is the 10-year outlook for the global Intelligent Computing Center Diesel Generator Sets market?

What factors are driving Intelligent Computing Center Diesel Generator Sets market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Intelligent Computing Center Diesel Generator Sets market opportunities vary by end market size?

How does Intelligent Computing Center Diesel Generator Sets break out by Type, by Application?

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